State of UWC and Strategy Introduction

October 2016
UWC movement

In 50 years we have found and educated close to 60,000 alumni to become agents for a more peaceful and sustainable future
UWC in 2016

- 155 UWC national committees incl. 5 new
- 17 UWC schools and colleges
- 3 UWC school and college proposals
- 12 UWC short courses
Our Students

- Students: 9,533
- Students in IBDP years: 4,115
- Day students in IBDP years: 1,024
- M:F % ratio in IBDP years: 43:57
- NC selected students in IBDP years: 2,607
- Students on full scholarship in IBDP years: 858
- Direct entry Residential students: 484

Last year we crossed the 4000-mark in IBDP students - almost 60% are female.

Source: Schools and Colleges Annual Reports 2015 - 2016/ Nomination data 2015 - 2016
National Committees

Our national committee system is a worldwide network of dedicated volunteers identifying talent and promise way beyond the global elite.

<table>
<thead>
<tr>
<th>National committees</th>
<th>Active NC members + selection volunteers*</th>
<th>Students selected in 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>155</td>
<td>3,448</td>
<td>1,303</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hours spent on preparation</th>
<th>Hours spent on promotion</th>
<th>Hours spent on selection</th>
</tr>
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<tbody>
<tr>
<td>5,438</td>
<td>13,898</td>
<td>46,465</td>
</tr>
</tbody>
</table>

Source: top row: Annual Reports 2016 / 2014 Volunteer Survey
*there may be some overlap between these groups
UWC Structure

The newly formed Committee of National Committees (CNC) is now firmly established in UWC International’s governance structure.
Financials

Financial Data Survey 2013-2014

$209,396m total expenditure

$130m total staff costs

1,841 FTE total staff

932 of those are academic staff

62% of total expenditure

Financial Data Survey 2015-2016

$217,882m total expenditure

$143m total staff costs

2,103 FTE total staff

1091 of those are academic staff

66% of total expenditure

Growth in total expenditure is still driven by significant cost inflation in most schools and colleges.
Income differences between the colleges remain staggering. UWC-USA, Pearson and Maastricht saw the highest increases in income last year.

At current exchange rate UWC Atlantic total income is at USD 16.039m with about 2.2m going to CAPEX.
Sources of tuition

We are still falling short of meeting all demonstrated need - the funding gap is estimated at USD 25m

<table>
<thead>
<tr>
<th>Source</th>
<th>IBDP Fee (2 years) 2014-2015</th>
<th>IBDP Fee (2 years) 2015-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dilijan</td>
<td>$70,000</td>
<td>$70,000</td>
</tr>
<tr>
<td>Pearson</td>
<td>$68,250</td>
<td>$76,800</td>
</tr>
<tr>
<td>RBC</td>
<td>$55,469</td>
<td>$57,600</td>
</tr>
<tr>
<td>RCN</td>
<td>$52,620</td>
<td>$54,400</td>
</tr>
<tr>
<td>USA</td>
<td>$73,500</td>
<td>$73,500</td>
</tr>
<tr>
<td>Changshu</td>
<td>$91,680</td>
<td>$93,200</td>
</tr>
<tr>
<td>Maastricht</td>
<td>$57,644</td>
<td>$59,800</td>
</tr>
<tr>
<td>Mostar</td>
<td>$30,454</td>
<td>$31,600</td>
</tr>
<tr>
<td>Adriatic</td>
<td>$46,768</td>
<td>$48,600</td>
</tr>
<tr>
<td>Costa Rica</td>
<td>$64,000</td>
<td>$70,000</td>
</tr>
<tr>
<td>Mahindra</td>
<td>$53,242</td>
<td>$58,600</td>
</tr>
<tr>
<td>LPC</td>
<td>$68,102</td>
<td>$71,800</td>
</tr>
<tr>
<td>Atlantic</td>
<td>$87,586</td>
<td>$86,200</td>
</tr>
<tr>
<td>SEA</td>
<td>$96,374</td>
<td>$108,600</td>
</tr>
<tr>
<td>WK</td>
<td>$36,980</td>
<td>$38,400</td>
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</tbody>
</table>

* Adriatic does not accept parental contributions so any parental funds have been included in NC income
** Full schools show IB Diploma students only

Distribution of funding 2015-16

* Current fee (2016/17) for UWC Atlantic is at USD $70,411 mainly due to exchange rate difference.

Source: Nomination Data Survey 2015-2016
Sources of tuition

Across our two-year colleges, two thirds of tuition are covered by scholarships - and the number is set to increase further this year.

Average funds paid by parents, NCs and colleges in 2014 - 2015 and 2015 - 2016

IB Diploma Colleges

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Parents</td>
<td>33</td>
<td>32</td>
</tr>
<tr>
<td>NCs</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>College</td>
<td>55</td>
<td>56</td>
</tr>
</tbody>
</table>

Full Schools

<table>
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<tr>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Parents</td>
<td>74</td>
<td>70</td>
</tr>
<tr>
<td>NCS</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>College</td>
<td>23</td>
<td>27</td>
</tr>
</tbody>
</table>

Source: Nomination Data Survey 2015-2016, including direct entry
While scholarship growth has come only from new schools and colleges in recent years, 2017 will see a big increase across all schools and colleges.

**Offers for 2011-2017 for all 16 colleges**

- **2011/12**: 567
- **2012/13**: 527
- **2013/14**: 416
- **2014/15**: 440
- **2015/16**: 559
- **2016/17**: 524
- **2017/18**: 495

**Offers for 2013-2017 without new colleges**

- **2013/14**: 416
- **2014/15**: 440
- **2015/16**: 521
- **2016/17**: 528
- **2017/18**: 449

**Offers for 2017**

- **38% (+157)** full + up to full offers
- **34% (+36)** part funded offers
- **27% (-28)** unfunded offers

Source: Offers data 2011 - 2017
NC Contribution

NC generated contributions to UWCs (fundraising and parental contributions) have increased by another USD 9.3m from last year to this year.

Contributions from NCs in 2010: $18,670,473
Contributions from NCs in 2015: $24,901,334
Contributions from NCs in 2016: $34,259,422

Increase 2010-2015: $15,588,949
Increase from 2014 to 2015: $9,358,088

Source: 2010 Confirmed entry, 2014 and 2015 Nomination data
UWC makes education a force to unite people, nations and cultures for peace and a sustainable future.

UWC Mission

illiteracy, injustice, disease, mistrust, unsustainability, development, hunger, war, poor sanitation, gender inequality, biodiversity loss, over consumption

fairness, communication, inclusion, open-mindedness, freedom, understanding, peace, equality, social justice, safety, sustainability, ethics, responsibility
Quality and distinctiveness are at the core of UWC’s future strategy.

Financial sustainability is a prerequisite for the scholarship-based UWC education and future growth.

We propose no specific growth target - we embrace growth as the result of successfully developing both UWC’s quality and distinctiveness and its financial sustainability.
Strategy beyond 2016

Three pillars of UWC strategy:
- Education strategy
- National Committee strategy and
- Engagement & Outreach strategy.

These three pillars need to be built on a solid base of financial sustainability, robust governance, scalable processes, professional communication and the effective use of digital technology.
Three organisations in one

The three pillars of UWC’s strategic development each require a different type of organisation:

- a professional education organisation
- a volunteer organisation
- and an advocacy organisation
Four basic ideas

Four ideas form the basis for a UWC education:

- **Deliberate diversity** - we build on deliberate diversity not just in the composition of our student and staff bodies, but also in our school models and the cultural contexts we operate in and we are united by the UWC values and a values-based approach to education.

- **Trust and responsibility** - we have trust in our students inspiring them to take responsibility; they must have the freedom to try and to learn from failure. We nurture care and compassion and encourage selfless leadership. We provide students with a space for personal “sense making” rather than reception of preconceived ideas.

- **Meeting all demonstrated need** - we select needs blind and provide scholarships to bring together talent from across all social divides and from the most unlikely places enabling the deliberate diversity of our student and alumni communities.

- **Celebrating all UWC students, alumni and staff** - irrespective of their programme or avenues of entry across schools, colleges and short courses.

The UWC mission and values provide a common base. UWC International provides a common framework and direction. The UWC schools and colleges have the room to experiment and develop their own interpretations of “UWCness” based on these four basic ideas.
A deliberately diverse community - across national, religious and social boundaries - is at the heart of our UWC “magic”.

- **UWC Community**
- **UWC Values**
- **Teaching: Experiential Learning**
- **Experience:** Active – Academic – Social – Personal – Outdoor – Service
- **Mission and Outcomes:** Peace and a Sustainable Future – Courageous Action – Personal Example – Selfless Leadership
Education strategy 1

Delivering a unique educational experience for UWC students
- **IB plus X:** curriculum innovation to extend room for UWC specific education
- **Values-based education** and encounter-based learning
- Critical reflection and continuous improvement of UWC education
- Scalable short course programmes and special educational projects and initiatives in areas of special need

Delivering excellence through our staff and teaching practice
- **Diverse teaching bodies** balanced in age distribution and committed to excellence in teaching
- **Professional development of staff**, best practice and innovation sharing
- **Systematic development of leadership** from within UWC and from partner organisations
- **Director of Education** at UWCIO
- Internationally recognised **accreditation of all UWCs** to ensure **contemporary professional practice**
- **Laboratories of learning (“One pilot per year”)** and sharing **best practice** across campuses
Education strategy 2

Ensuring our students gain the skills to become agents of positive change

- Ethical and selfless leadership
- Developing critical thinking and constructive engagement
- Developing a sense of personal challenge for endurance and resilience
- Student led services and projects developing capacity to take action mindful of the risks involved
- Developing a sense of continuing commitment and lifelong engagement with UWC

Ensuring an environment of student autonomy and appropriate support

- Supporting the unique needs of a deliberately diverse and inclusive student body and community
- Promoting safe, healthy, resilient and mindful lifestyles
- Developing a pastoral care experience balancing student autonomy, trust and responsibility with the reassuring presence of adults
- Developing capacity for appropriate mental health support for students in special situations
National Committee strategy

Meeting all demonstrated need within 5 years

NC selection of IBDP students based on promise and potential irrespective of capacity to pay

- Enabling mother tongue selection processes
- Ensuring a diverse pool of applicants to enable a deliberately diverse student body
- Streamlining NC selection criteria, processes and eligibility
- Ensuring exclusivity of NC selections and developing fee payer selection capability to scale back direct entry to <5%
- Coordinating offers to ensure NCs receive reliable offer patterns

Developing the capacity of the NC system

- Support NCs to become stronger, identifying support and development needs
- Supporting NC’s through an NC Fund set up on behalf of the CNC and managed by UWCIO
- Establishing NC support structure to avert volunteer fatigue and build additional NC capacity
- Development of NCs in under-represented regions, e.g. Gulf States and West Africa
NC’s to share the financial burden of meeting all demonstrated need
- Doubling NC fundraising income by 2020 from US$10m to US$20m by doubling the number of NCs that are financially self sufficient through fundraising, to between 25 and 30 (Pledge of “Financial self sufficiency within 5 years”)
- Adding fundraising support for NC volunteers

Maximising NC impact
- Significantly increasing in the number of short course programmes delivered by NCs across the globe
- Further developing NC engagement in preparation of students and parents
- Defining pastoral responsibilities of NCs in liaising with parents
- Engaging with alumni locally and building networks of mutual support in serving the UWC mission
Engagement and outreach strategy

Foster an active and engaged UWC community to advance the UWC mission and values and to increase UWC’s impact

- **UWC Hub** to connect and inspire action across the UWC community
- **Projects for positive change under UWCx brand**
- Organise **UWC events** across the world
- Study by a recognised academic institution to **analyse impact of UWC education**
- **UWC short course programmes** (“More UWC education to more people”)
- Challenge/promote UWC alumni to agreeing to a **“generational contract”** to give back to UWC

Make UWC one of the most respected voices in intercultural and diversity education

**UWC to form strategic alliances with partners with strong mission-fit**

**UWC to promote elements of its educational model to other schools**

**UWC schools and colleges to engage in dialogue with the societies around them based on the UWC mission and values**
Ensuring financial stability

Securing additional funding of USD 25m annually* to meet all demonstrated need:

- Joint responsibility across schools and colleges, NCs and UWCIO
- All schools and colleges to have established fundraising operations suitable to their specific circumstances and context to avoid overreliance on other UWC stakeholders (NCs, UWCIO) or fee payers fundraising functions (“one team approach”) based on a common UWC Fundraising Strategy
- Doubling the fundraising contribution of NCs by doubling the number of fundraising NCs
- UWCIO to cover the difference through major donor programs for scholarships

Financial reporting and monitoring by UWCIO across all entities to provide transparency and support

Enforcement of financial criteria for new schools and colleges to avoid increase in size of the “funding gap”

Development of strategy to address backlog of USD 100m in capital expenditure to maintain campuses at UWC schools and colleges as a primary responsibility of school and college Boards

* Based on UWCIO estimates USD 25m is the additional annual scholarship funding needed to select fully needs-blind and meet all demonstrated financial need of all residential UWC IB Diploma students
Robust and responsive governance

A common direction whilst encouraging diverse ways of living “UWCness”
- UWC is united by the UWC mission and values
- UWC International provides a common framework and direction
- The schools and colleges have the room to experiment and find their own interpretation of “UWCness”

UWC Council to grow in line with school and college growth
- ¼ Heads, ¼ Chairs, ¼ NC representatives, ¼ members at large - e.g. from 60 current to 100 members with 25 UWCs

Developing a governance culture suited to “three organisations in one”
- Ensuring efficiency in terms of governance, papers and meetings
- Being mindful of volunteers’ need to balance professional and UWC commitments

Developing a robust framework of contractual relationships
- Building framework to enable coordination, reputation/brand management, quality assurance, risk management, reporting and monitoring
Scalable operations and processes

**UWCIO operations to follow proportionate growth path** in line with number of UWCs (based on 1.9% levy)

**NC Fund and further support structures** to be developed in close coordination with the CNC and to be managed by UWCIO to provide boost in NC support and capacity building

**Efficient and transparent processes to be adapted to the needs of “three organisations in one”**

Application and selection, offer allocation and nominations processes to be streamlined and supported by technology

Simplify processes and reduce bureaucracy across the system
Position UWC as a **leading voice in education for peace and sustainability** based on diversity and intercultural understanding (“External Communications”)

Create internal culture of sharing and easy access to information which fosters efficiency and collaboration across stakeholders (“Internal Communications”)

Explore strategic use of **information and communication technology to** enhance learning, serve UWC values and **facilitate communication and collaboration across UWC campuses**
Our strategic aspirations

UWC makes education a force to unite people, nations and cultures for peace and a sustainable future.

- UWC will be **one of the most respected global education organisations**, built on a strong mission and values and **deliberately diverse community** at all levels
- UWC will provide its students with scholarships meeting all demonstrated **financial need** enabled through **systematic fundraising**
- UWC will have established highly **professional and volunteer-run national committees**
- UWC will institute a **generational contract** to give back
- The UWC community will be engaged in **life-long pursuit of the UWC mission**
- UWC will be **a leading voice** for diversity-based intercultural education for peace and sustainability.
Maximizing impact

UWC’s impact will grow

- by further **deepening the student experience**,  
- by **welcoming new schools and colleges** committing to the UWC mission and educational model,  
- by reaching out to other schools to promote elements of UWC education,  
- by running an ever **growing number of short-courses** to deliver the UWC mission across the globe,  
- by developing special educational projects and initiatives in global areas of need,  
- by **engaging in dialogue with the societies around** our school and colleges based on the UWC mission and values and  
- by **activating its nearly 60,000 alumni** and broader community to develop and deliver projects in pursuit of the UWC mission across the globe.

WE HAVE ONLY JUST BEGUN!